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CCH Axcess Tax Electronic Filing Setup

User Guide

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Chapter 1

Setting Electronic Filing Options and Access

Open Dashboard, click **Configuration** on the navigation panel, and then click the following links to configure default settings that will reduce your data input when filing electronically:

- **Settings and defaults under Firm**. Click **eSign** on the navigation panel to set up an eSign account and create eSign users for signers to request digital signatures, if your firm is licensed for eSign.
- **Return configuration sets under Tax**. Expand a return configuration set name on the Return Configuration navigation panel, and then click **Electronic Filing Options** to set default electronic filing options for Individual, Partnership, Corporation, S Corporation, Fiduciary, Exempt Organization, and Employee Benefit Plan tax products. See *Chapter 2 - Managing Return Configuration Set Electronic Filing Options* on page 3 for more information.
- **Staff under Staff Manager**. Open a staff profile and click **Tax > Signer** on the navigation panel to configure signer identification information.
- **Security Group**. On the Security Group profile window, select **Functional rights** on the navigation panel, click the **Tax** tab, and grant the appropriate permissions under *Tax Preparation* and under *Electronic Filing*.

In Return Manager, select **User Options** on the Application menu. On the Tax > Miscellaneous window, select your preferred method for receiving desktop notifications. The notifications display the status of files that are uploaded to the Electronic Filing Status system.

Overriding Default Settings

You can override default settings in a tax return using the General > Electronic Filing worksheet.

Chapter 2

Managing Return Configuration Set Electronic Filing Options

Tax allows you to reduce data entry time by configuring default electronic filing settings for Individual, Partnership, Corporation, S Corporation, Fiduciary, Exempt Organization, and Employee Benefit Plan returns in a return configuration set. You can override electronic filing options in the return configuration set using the General > Electronic Filing worksheet.

To set default electronic filing options, do the following:

1. Open Dashboard, click **Configuration** on the navigation panel, and then click **Return configuration sets** under Tax.
2. Double-click a return configuration set on the navigation panel.
3. Click **Electronic Filing Options > General** on the navigation panel.
4. Enter information for default electronic filing options in the various areas.

Component	Description
Electronic Filing Identification Number (EFIN)	Enter the Electronic Filing Identification Number registered by the IRS for electronically filing Individual, Partnership, Corporation, S Corporation, and Fiduciary returns. **Note**: If **Use signer location for signature block** is selected on the return configuration set Signature Block window, the EFIN from Tax Lists > Signer Locations is applied to the return. See Managing Signer Locations for more information.
Taxpayer/Spouse PIN program information (1040)	Select to randomly generate the taxpayer and spouse PIN.
Electronic filing options	Select to not update the government form Electronic Filing Status Report and the electronic filing export window with the latest electronic filing status sent from Electronic Filing Status (EFS). This option applies to tax years 2013 and higher.
Print and correspondence options	Select the following information: • Select **Print full/entire government copy of electronic return** to include forms that are electronically filed in return government copies. • Select **Suppress printing of all forms during export** to exclude forms and payment vouchers with printed government copies when electronic files are created. • Select **Do not print nonfileable message on signature**

Component	Description
	forms to exclude the non-fileable message, *This is not a Fileable Copy*, when printing signature forms. • Select **Suppress printing of extension letters during export** to exclude extension letters when electronically filing extension forms. • Select how to process due dates in electronic filing paragraphs.

Electronic Return Originator (ERO) information	• Enter the following information:
	  ◦ ERO contact name
	  ◦ Preparer email address
	  ◦ ERO PIN
	• Select **Randomly generate the ERO PIN (1040 only)** to allow the system to randomly assign the ERO PIN for 1040 returns.
	• Select **Print the ERO name in the signature block of the 8879** to print the ERO name on Form 8879. The *Print signer signature* option on the return configuration set Signature Block window must also be selected. This option is applied to tax years 2011 and higher.
	Important: Changes to this option are not applied to returns for tax years prior to 2011.

Electronic Return Originator (ERO) overrides	Select to replace signature block information with ERO overrides. If you select this box, enter the following information: • ERO name • ERO address • ERO city • State • ERO Zip code • Country • ERO EIN • ERO SSN • Alternate ERO ID no. (PTIN) • ERO telephone number
Self-employed	Select to override self-employed information on the signature block.

5. Click **Save** to save your changes and continue working in the return configuration set, or click **Save and Close** to save your changes and close the return configuration set.

Managing Return Configuration Set 1040/Individual Electronic Filing Options

The 1040/Individual window in the return configuration set displays electronic filing configuration options that apply to all Individual returns. You can override electronic filing options in the return configuration set using the General > Electronic Filing worksheet.

To configure 1040/Individual electronic filing options, do the following:

1. Open Dashboard, click **Configuration** on the navigation panel, and then click **Return configuration sets** under Tax.
2. Double-click a return configuration set on the navigation panel.
3. Click **Electronic Filing Options** > **1040/Individual** on the navigation panel.
4. Enter information for 1040/Individual filing options.

Component	Description
Electronically file return	Select to enable returns for electronic filing.
Electronically file extension	Select to enable extensions for electronic filing. This option is applied to tax years 2012 and higher. Important: The Electronically file return option is applied to both returns and extensions for tax years prior to 2012.
File all balance due returns electronically	Select to file balance due returns electronically.
File home state return electronically	Select to file home state s in the return electronically.
File all applicable states electronically	Select to file all state s in the return electronically.
Electronically file city return	Select to file cities in the return electronically. This option applies to tax years 2013 and higher.
Electronically file other returns	Select to electronically file the following returns: • 1040. LLC and property tax • 1041. New York 204LL and Wisconsin PW-1 • 1120. Alabama CPT and New York 204LL • 1120S. Alabama CPT, New York 204LL, and Wisconsin PW1 • 1065. Alabama PPT, New York 204LL, Pennsylvania RCT-101I, and Wisconsin PW1 This option applies to tax years 2013 and higher.
Electronically file federal elections with signatures required	Select to include federal elections requiring signatures with Individual electronic files.

Component	Description
Suppress printing of the taxpayer signature dates	Select to suppress printing of the taxpayer signature dates. This option is applied to tax years 2012 and higher. **Important**: Changes to this option are not applied to returns for tax years prior to 2012.
Always produce 8879-SO during export	Select to prepare Form 8879-SO, State-only e-file Signature Authorization, when exporting electronic files. This option applies to tax years 2013 and higher.
Electronically sign authorization form(s)	Select to electronically file Form 8879 with a digital signature for federal and qualifying states. When enabled, this option also includes information in the transmittal letter and filing instructions that a return has been sent for eSign. **Notes**: • This option applies to tax years 2013 and higher. • This option does not apply to amended or IT-204LL (New York) returns, to extensions, or to filing Report of Foreign Bank and Financial Accounts (FBAR).
Enable eSign if state returns do not qualify	Select to electronically file Form 8879 with a digital signature for federal and qualifying states when a state that does not qualify for eSign exists in the return. **Note**: This option applies to tax years 2014 and higher.
Transmittal/filing instructions paragraph	Select how to print the transmittal letter and filing instruction paragraph for returns filed electronically. Select one of the following: • Not applicable • Standard • Alternate • Suppress • No further action • No further action - return Form 8879
Electronic filing notification to client option	Select one of the following for clients to receive notifications when returns or extensions are accepted by a taxing authority: • Notify all clients by email • Notify all clients by postcard • Notify clients by postcard only if the email address has not been input • Send no notification to tax clients **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link.

Component	Description
	• Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing notification to signer option	Select one of the following for signers to receive notifications when returns or extensions are accepted by a taxing authority: • Notify all signers by email • Notify all signers by postcard • Send no notification to signer This option is applied to tax years 2011 and higher. **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing rejection notification to signer option	Select one of the following options for the treatment of electronic filing rejection/stopped notifications: • Send no notifications • Send e-mail to signer • Send e-mail to alternate signer e-mail address • Send e-mail to both signer and alternate **Notes**: • Signer details are entered on the Tax > Signer window in the staff profile. • This option applies to tax years 2013 and higher.
Send notification to signer when 8879 has not been received	Select for signers to receive notifications when taxpayer signatures have not been received on Form 8879 within a designated time period. A notification is sent when a date has not been entered in the Electronic Filing Status system *Signature Form - Received* column within the designated time period. The notification is sent to the signer's email address or, if entered, to the signer's alternate email address. Select the check box, and then accept the default number of days, or enter a different number. This option is applied to tax years 2012 and higher.

Component	Description
Send e-mail notification to e-mail address below in lieu of signer	If you selected to notify signers by email (the *electronic filing* option or the *8879 has not been received* option), you can enter an alternate email address to receive notifications in lieu of the signer's email address. Important: If you select to send email notifications to an alternate address, you must enter the email address; otherwise, notifications are not sent.
Select the type of notification to be received	If you selected to send electronic filing notifications to clients or signers, by default, Return is selected. You can change your selection from the following options: • Return • Extensions
Select the taxing authority you want to receive notifications for	If you selected to send electronic filing notifications to clients or signers, by default, Federal is selected. You can change your selection from the following options: • Federal • State/Cities • FBAR Note: The FBAR option applies to the following: • Returns filed to report foreign bank and financial account information • Tax years 2014 and higher

5. Click **Save** to save your changes and continue working in the return configuration set, or click **Save and Close** to save your changes and close the return configuration set.

Managing Return Configuration Set 1065/Partnership Electronic Filing Options

The 1065/Partnership window in the return configuration set displays electronic filing configuration options that apply to all Partnership returns. You can override electronic filing options in the return configuration set using the General > Electronic Filing worksheet, unless noted differently in the component explanations under step 4.

To configure 1065/Partnership electronic filing options, do the following:

1. Open Dashboard, click **Configuration** on the navigation panel, and then click **Return configuration sets** under Tax.
2. Double-click a return configuration set on the navigation panel.
3. Click **Electronic Filing Options** > **1065/Partnership** on the navigation panel.
4. Enter information for 1065/Partnership filing options in the various areas.

Component	Description
Electronically file return	Select to enable returns for electronic filing.

Component	Description
Electronically file extension	Select to enable extensions for electronic filing. This option is applied to tax years 2012 and higher. **Important**: The Federal electronic filing method setting is applied to both returns and extensions for tax years prior to 2012.
File all applicable states electronically	Select to file all states in the return electronically.
Electronically file city return	Select to file cities in the return electronically. This option applies to tax years 2013 and higher.
Electronically file other returns	Select to electronically file the following returns: • **1040**. LLC and property tax • **1041**. New York 204LL and Wisconsin PW-1 • **1120**. Alabama CPT and New York 204LL • **1120S**. Alabama CPT, New York 204LL, and Wisconsin PW1 • **1065**. Alabama PPT, New York 204LL, Pennsylvania RCT-101I, and Wisconsin PW1 This option applies to tax years 2013 and higher.
Electronically file composite return	Select to file the following composite returns electronically: • **1120S**. Alabama Composite, Massachusetts Composite, and Wisconsin 1CNS • **1065**. Alabama Composite, Massachusetts Composite, Mississippi Composite, and Wisconsin 1CNS This option applies to tax years 2013 and higher.
Create California magnetic file	Select to create Partnership California K-1 magnetic media data files. You can override this option on a per return basis using the Federal > General > Electronic Filing > Section 4 worksheet.
Create New Jersey NJ-1080-C diskette file	Select to create Partnership NJ-1080-C diskette files. Partnership Diskette Filing is applicable only to returns for which the Federal Partnership return is being electronically filed. You can override this option on a per return basis using the Federal > General > Electronic Filing > Section 4 worksheet.
Create AR 1000CR magnetic file	Select to create the Arkansas partnership information (AR 1000CR) magnetic media export file. You can override this option on a per return basis using the Federal > General > Electronic Filing > Section 4 worksheet.
Transmittal/filing instructions paragraph	Select one of the following: • Notify all clients by email (default) • Notify all clients by postcard • Notify all clients by postcard only if the email address has not been input • Send no notification to tax clients

Component	Description
Electronic filing notification to client option	Clients can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all clients by email • Notify all clients by postcard • Notify clients by postcard only if the email address has not been input • Send no notification to tax clients **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing notification to signer option	Beginning with the 2011 tax year, signers can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all signers by email • Notify all signers by postcard • Send no notification to signer **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing rejection notification to signer option	Select one of the following options for the treatment of electronic filing rejection/stopped notifications: • Send no notifications • Send e-mail to signer • Send e-mail to alternate signer e-mail address • Send e-mail to both signer and alternate **Notes**: • Signer details are entered on the Tax > Signer window in the staff profile.

Component	Description
	• This option applies to tax years 2013 and higher.
Send notification to signer when 8879 has not been received	Select for signers to receive notifications when taxpayer signatures have not been received on Form 8879 within a designated time period. A notification is sent when a date has not been entered in the Electronic Filing Status system *Signature Form - Received* column within the designated time period. The notification is sent to the signer's email address or, if entered, to the signer's alternate email address. Select the check box, and then accept the default number of days, or enter a different number. This option is applied to tax years 2012 and higher.
Send e-mail notification to e-mail address below in lieu of signer	If you selected to notify signers by email (the *electronic filing* option or the *8879 has not been received* option), you can enter an alternate email address to receive notifications in lieu of the signer's email address. **Important**: If you select to send email notifications to an alternate address, you must enter the email address; otherwise, notifications are not sent.
Select the type of notification to be received	If you selected to send electronic filing notifications to clients or signers, by default, Return is selected. You can change your selection from the following options: • Return • Extensions
Select the taxing authority you want to receive notifications for	If you selected to send electronic filing notifications to clients or signers, by default, Federal is selected. You can change your selection from the following options: • Federal • State/Cities • FBAR **Note**: The FBAR option applies to the following: • Returns filed to report foreign bank and financial account information • Tax years 2014 and higher

5. Click **Save** to save your changes and continue working in the return configuration set, or click **Save and Close** to save your changes and close the return configuration set.

Managing Return Configuration Set 1120/Corporation Electronic Filing Options

The 1120/Corporation window in the return configuration set displays electronic filing configuration options that apply to all Corporation returns. You can override electronic filing options in the return configuration set using the General > Electronic Filing worksheet.

To configure 1120/Corporation electronic filing options, do the following:

1. Open Dashboard, click **Configuration** on the navigation panel, and then click **Return configuration sets** under Tax.
2. Double-click a return configuration set on the navigation panel.
3. Click **Electronic Filing Options** > **1120/Corporation** on the navigation panel.
4. Enter information for 1120/Corporation filing options in the various areas.

Component	Description
Electronically file return	Select to enable returns for electronic filing.
Electronically file extension	Select to enable extensions for electronic filing. This option is applied to tax years 2012 and higher. Important: The Electronically file return option is applied to both returns and extensions for tax years prior to 2012.
File all balance due returns electronically	Select to file balance due returns electronically.
File all applicable states electronically	Select to file all states in the return electronically.
Electronically file city return	Select to file cities in the return electronically. This option applies to tax years 2013 and higher.
Electronically file other returns	Select to electronically file the following returns: • 1040. LLC and property tax • 1041. New York 204LL and Wisconsin PW-1 • 1120. Alabama CPT and New York 204LL • 1120S. Alabama CPT, New York 204LL, and Wisconsin PW1 • 1065. Alabama PPT, New York 204LL, Pennsylvania RCT-101I, and Wisconsin PW1 This option applies to tax years 2013 and higher.
Transmittal/filing instructions paragraphs	Select how to print the transmittal letter and filing instruction paragraph for returns filed electronically. Select one of the following: • Not applicable • Standard • Alternate • Suppress • No further action

Component	Description
	• No further action - return Form 8879-C
Electronic filing notification to client option	Beginning with the 2011 tax year, clients can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all clients by email • Notify all clients by postcard • Notify clients by postcard only if the email address has not been input • Send no notification to tax clients **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing notification to signer option	Beginning with the 2011 tax year, signers can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all signers by email • Notify all signers by postcard • Send no notification to signer **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing rejection notification to signer option	Select one of the following options for the treatment of electronic filing rejection/stopped notifications: • Send no notifications • Send e-mail to signer • Send e-mail to alternate signer e-mail address • Send e-mail to both signer and alternate

Component	Description
	Notes: • Signer details are entered on the Tax > Signer window in the staff profile. • This option applies to tax years 2013 and higher.
Send notification to signer when 8879 has not been received	Select for signers to receive notifications when taxpayer signatures have not been received on Form 8879 within a designated time period. A notification is sent when a date has not been entered in the Electronic Filing Status system *Signature Form - Received* column within the designated time period. The notification is sent to the signer's email address or, if entered, to the signer's alternate email address. Select the check box, and then accept the default number of days, or enter a different number. This option is applied to tax years 2012 and higher.
Send e-mail notification to e-mail address below in lieu of signer	If you selected to notify signers by email (the *electronic filing* option or the *8879 has not been received* option), you can enter an alternate email address to receive notifications in lieu of the signer's email address. **Important**: If you select to send email notifications to an alternate address, you must enter the email address; otherwise, notifications are not sent.
Select the type of notification to be received	If you selected to send electronic filing notifications to clients or signers, by default, Return is selected. You can change your selection from the following options: • Return • Extensions
Select the taxing authority you want to receive notifications for	If you selected to send electronic filing notifications to clients or signers, by default, Federal is selected. You can change your selection from the following options: • Federal • State/Cities • FBAR **Note**: The FBAR option applies to the following: • Returns filed to report foreign bank and financial account information • Tax years 2014 and higher

5. Click **Save** to save your changes and continue working in the return configuration set, or click **Save and Close** to save your changes and close the return configuration set.

Managing Return Configuration Set 1120S/S Corporation Electronic Filing Options

The 1120S/S Corporation window in the return configuration set displays electronic filing configuration options that apply to all S Corporation returns. You can override electronic filing options in the return configuration set using the General > Electronic Filing worksheet.

To configure 1120S/S Corporation electronic filing options, do the following:

1. Open Dashboard, click **Configuration** on the navigation panel, and then click **Return configuration sets** under Tax.
2. Double-click a return configuration set on the navigation panel.
3. Click **Electronic Filing Options** > **1120S/S Corporation** on the navigation panel.
4. Enter information for 1120S/S Corporation filing options in the various areas.

Component	Description
Electronically file return	Select to enable returns for electronic filing.
Electronically file extension	Select to enable extensions for electronic filing. This option is applied to tax years 2012 and higher. Important: The Electronically file return option is applied to both returns and extensions for tax years prior to 2012.
File all balance due returns electronically	Select to file balance due returns electronically.
File all applicable states electronically	Select to file all state s in the return electronically.
Electronically file city return	Select to file cities in the return electronically. This option applies to tax years 2013 and higher.
Electronically file composite return	Select to file the following composite returns electronically: • 1120S. Alabama Composite, Massachusetts Composite, and Wisconsin 1CNS • 1065. Alabama Composite, Massachusetts Composite, Mississippi Composite, and Wisconsin 1CNS This option applies to tax years 2013 and higher.
Electronically file other returns	Select to electronically file the following returns: • 1040. LLC and property tax • 1041. New York 204LL and Wisconsin PW-1 • 1120. Alabama CPT and New York 204LL • 1120S. Alabama CPT, New York 204LL, and Wisconsin PW1 • 1065. Alabama PPT, New York 204LL, Pennsylvania RCT-101I, and Wisconsin PW1 This option applies to tax years 2013 and higher.

Component	Description
Create New Jersey NJ-1080-C diskette file	Select to create NJ-1080-C diskette files. S Corporate Diskette Filing is applicable only to returns for which the Federal return is being electronically filed. **Note**: You can override this option on a per return basis using the Federal > General > Electronic Filing > Section 4 worksheet.
Create AR 1000CR magnetic file	Select to create the Arkansas (AR 1000CR) magnetic media export file. **Note**: You can override this option on a per return basis using the Federal > General > Electronic Filing > Section 4 worksheet.
Transmittal/filing instructions paragraphs	Select how to print the transmittal letter and filing instruction paragraph for returns filed electronically. Select one of the following: • Not applicable • Standard • Alternate • Suppress • No further action • No further action - return Form 8879-S
Electronic filing notification to client option	Beginning with the 2011 tax year, clients can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all clients by email • Notify all clients by postcard • Notify clients by postcard only if the email address has not been input • Send no notification to tax clients **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing notification to signer option	Beginning with the 2011 tax year, signers can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all signers by email • Notify all signers by postcard • Send no notification to signer

Component	Description
	Notes: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing rejection notification to signer option	Select one of the following options for the treatment of electronic filing rejection/stopped notifications: • Send no notifications • Send e-mail to signer • Send e-mail to alternate signer e-mail address • Send e-mail to both signer and alternate **Notes**: • Signer details are entered on the Tax > Signer window in the staff profile. • This option applies to tax years 2013 and higher.
Send notification to signer when 8879 has not been received	Select for signers to receive notifications when taxpayer signatures have not been received on Form 8879 within a designated time period. A notification is sent when a date has not been entered in the Electronic Filing Status system *Signature Form - Received* column within the designated time period. The notification is sent to the signer's email address or, if entered, to the signer's alternate email address. Select the check box, and then accept the default number of days, or enter a different number. This option is applied to tax years 2012 and higher.
Send e-mail notification to e-mail address below in lieu of signer	If you selected to notify signers by email (the *electronic filing* option or the *8879 has not been received* option), you can enter an alternate email address to receive notifications in lieu of the signer's email address. **Important**: If you select to send email notifications to an alternate address, you must enter the email address; otherwise, notifications are not sent.
Select the type of notification to be received	If you selected to send electronic filing notifications to clients or signers, by default, Return is selected. You can change your selection from the following options: • Return • Extensions

Component	Description
Select the taxing authority you want to receive notifications for	If you selected to send electronic filing notifications to clients or signers, by default, Federal is selected. You can change your selection from the following options: • Federal • State/Cities • FBAR **Note**: The FBAR option applies to the following: • Returns filed to report foreign bank and financial account information • Tax years 2014 and higher

5. Click **Save** to save your changes and continue working in the return configuration set, or click **Save and Close** to save your changes and close the return configuration set.

Managing Return Configuration Set 1041/Fiduciary Electronic Filing Options

The 1041/Fiduciary window in the return configuration set displays electronic filing configuration options that apply to Fiduciary returns. You can override electronic filing options in the return configuration set using the General > Electronic Filing worksheet.

To configure 1041/Fiduciary electronic filing options, do the following:

1. Open Dashboard, click **Configuration** on the navigation panel, and then click **Return configuration sets** under Tax.
2. Double-click a return configuration set on the navigation panel.
3. Click **Electronic Filing Options** > **1041/Fiduciary** on the navigation panel.
4. Enter information for 1041/Fiduciary filing options in the various areas

Component	Description
Electronically file return	Select to enable returns for electronic filing.
Electronically file extension	Select to enable extensions for electronic filing. This option is applied to tax years 2012 and higher. **Important**: The Electronically file return option is applied to both returns and extensions for tax years prior to 2012.
File all balance due returns electronically	Select to file balance due returns electronically.
File all applicable states electronically	Select to file all states in the return electronically.

Component	Description
Electronically file other returns	Select to electronically file the following returns: • **1040**. LLC and property tax • **1041**. New York 204LL and Wisconsin PW-1 • **1120**. Alabama CPT and New York 204LL • **1120S**. Alabama CPT, New York 204LL, and Wisconsin PW1 • **1065**. Alabama PPT, New York 204LL, Pennsylvania RCT-101I, and Wisconsin PW1 This option applies to tax years 2013 and higher.
Transmittal/filing instructions paragraph	Select how to print the transmittal letter and filing instruction paragraph for returns filed electronically. Select one of the following: • Not applicable • Standard • Alternate • Suppress • No further action • No further action - send Form 8879-F
Electronic filing notification to client option	Beginning with the 2011 tax year, clients can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all clients by email • Notify all clients by postcard • Notify clients by postcard only if the email address has not been input • Send no notification to tax clients **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing notification to signer option	Beginning with the 2011 tax year, signers can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all signers by email • Notify all signers by postcard • Send no notification to signer

Component	Description
	Notes: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing rejection notification to signer option	Select one of the following options for the treatment of electronic filing rejection/stopped notifications: • Send no notifications • Send e-mail to signer • Send e-mail to alternate signer e-mail address • Send e-mail to both signer and alternate **Notes**: • Signer details are entered on the Tax > Signer window in the staff profile. • This option applies to tax years 2013 and higher.
Send notification to signer when 8879 has not been received	Select for signers to receive notifications when taxpayer signatures have not been received on Form 8879 within a designated time period. A notification is sent when a date has not been entered in the Electronic Filing Status system *Signature Form - Received* column within the designated time period. The notification is sent to the signer's email address or, if entered, to the signer's alternate email address. Select the check box, and then accept the default number of days, or enter a different number. This option is applied to tax years 2012 and higher.
Send e-mail notification to e-mail address below in lieu of signer	If you selected to notify signers by email (the *electronic filing* option or the *8879 has not been received* option), you can enter an alternate email address to receive notifications in lieu of the signer's email address. **Important**: If you select to send email notifications to an alternate address, you must enter the email address; otherwise, notifications are not sent.
Select the type of notification to be received	If you selected to send electronic filing notifications to clients or signers, by default, Return is selected. You can change your selection from the following options: • Return • Extensions

Component	Description
Select the taxing authority you want to receive notifications for	If you selected to send electronic filing notifications to clients or signers, by default, Federal is selected. You can change your selection from the following options: • Federal • State/Cities • FBAR **Note**: The FBAR option applies to the following: • Returns filed to report foreign bank and financial account information • Tax years 2014 and higher

5. Click **Save** to save your changes and continue working in the return configuration set, or click **Save and Close** to save your changes and close the return configuration set.

Managing Return Configuration Set 5500/Employee Benefit Plan Electronic Filing Options

The 5500/Employee Benefit Plan window in the return configuration set displays electronic filing configuration options that apply to all Employee Benefit Plan returns. You can override electronic filing options in the return configuration set using the General > Electronic Filing worksheet.

To configure 5500/Employee Benefit Plan electronic filing options, do the following:

1. Open Dashboard, click **Configuration** on the navigation panel, and then click **Return configuration sets** under Tax.
2. Double-click a return configuration set on the navigation panel.
3. Click **Electronic Filing Options** > **5500/Employee Benefit Plan** on the navigation panel.
4. Enter information for 5500/Employee Benefit Plan filing options in the various areas.

Component	Description
Electronically file return	Select to enable return for electronic filing.
Transmittal/filing instructions paragraph	Select how to print the transmittal letter and filing instruction paragraph for returns filed electronically. Select one of the following: • Not applicable • Standard • Alternate • Suppress • No further action
Electronic filing notification to client option	Beginning with the 2011 tax year, clients can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all clients by email

Component	Description
	• Notify all clients by postcard • Notify clients by postcard only if the email address has not been input • Send no notification to tax clients **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing notification to signer option	Beginning with the 2011 tax year, signers can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all signers by email • Notify all signers by postcard • Send no notification to signer **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing rejection notification to signer option	Select one of the following options for the treatment of electronic filing rejection/stopped notifications: • Send no notifications • Send e-mail to signer • Send e-mail to alternate signer e-mail address • Send e-mail to both signer and alternate **Notes**: • Signer details are entered on the Tax > Signer window in the staff profile. • This option applies to tax years 2013 and higher.

Component	Description
Send e-mail notification to e-mail address below in lieu of signer	If you selected to notify all signers by email, you can enter an alternate email address to receive notifications in lieu of the signer's email address. Important: If you select to send email notifications to an alternate address, you must enter the email address; otherwise, notifications are not sent.
Select the type of notification to be received	If you selected to send electronic filing notifications to clients or signers, by default, Return is selected. You can change your selection from the following options: • Return • Extensions
Select the taxing authority you want to receive notifications for	If you selected to send electronic filing notifications to clients or signers, by default, Federal is selected. You can change your selection from the following options: • Federal • States/Cities

5. Click **Save** to save your changes and continue working in the return configuration set, or click **Save and Close** to save your changes and close the return configuration set.

Managing Return Configuration Set 990/Exempt Electronic Filing Options

The 990/Exempt window in the return configuration set displays electronic filing configuration options that apply to all Exempt returns. You can override electronic filing options in the return configuration set using the General > Electronic Filing worksheet.

To configure 990/Exempt electronic filing options, do the following:

1. Open Dashboard, click **Configuration** on the navigation panel, and then click **Return configuration sets** under Tax.
2. Double-click a return configuration set on the navigation panel.
3. Click **Electronic Filing Options** > **990/Exempt** on the navigation panel.
4. Enter information for 990/Exempt filing options in the various areas.

Component	Description
Electronically file return	Select to enable returns for electronic filing.
Electronically file extension	Select to enable extensions for electronic filing. This option is applied to tax years 2012 and higher. Important: The Electronically file return option is applied to both returns and extensions for tax years prior to 2012.
File all balance due returns electronically	Select to file all balance due returns electronically.

Component	Description
File all applicable states electronically	Select to file all state s in the return electronically.
Transmittal/filing instructions paragraph	Select how to print the transmittal letter and filing instruction paragraph for returns filed electronically. Select one of the following: • Not applicable • Standard • Alternate • Suppress • No further action • No further action - send 8879-EO
Electronic filing notification to client option	Beginning with the 2011 tax year, clients can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all clients by email • Notify all clients by postcard • Notify clients by postcard only if the email address has not been input • Send no notification to tax clients **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link. • Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing notification to signer option	Beginning with the 2011 tax year, signers can receive notifications when returns or extensions are accepted by a taxing authority. Select one of the following: • Notify all signers by email • Notify all signers by postcard • Send no notification to signer **Notes**: • Notifications are not sent for returns or extensions that are rejected by a taxing authority. • Notifications are not sent for MI or OH city returns or extensions. You can review a delivery receipt from the city taxing authorities in Electronic Filing Status by clicking the *Accepted* status link.

Component	Description
	• Email notifications are free of charge, but postcard notifications are priced according to the latest Pricing Catalog for each taxing authority in the return.
Electronic filing rejection notification to signer option	Select one of the following options for the treatment of electronic filing rejection/stopped notifications: • Send no notifications • Send e-mail to signer • Send e-mail to alternate signer email address • Send e-mail to both signer and alternate **Notes**: • Signer details are entered on the Tax > Signer window in the staff profile. • This option applies to tax years 2013 and higher.
Send e-mail notification to e-mail address below in lieu of signer	If you selected to notify all signers by email, you can enter an alternate email address to receive notifications in lieu of the signer's email address. **Important**: If you select to send email notifications to an alternate address, you must enter the email address; otherwise, notifications are not sent.
Select the type of notification to be received	If you selected to send electronic filing notifications to clients or signers, by default, Return is selected. You can change your selection from the following options: • Return • Extensions
Select the taxing authority you want to receive notifications for	If you selected to send electronic filing notifications to clients or signers, by default, Federal is selected. You can change your selection from the following options: • Federal • State/Cities • FBAR **Note**: The FBAR option applies to the following: • Returns filed to report foreign bank and financial account information • Tax years 2014 and higher

5. Click **Save** to save your changes and continue working in the return configuration set, or click **Save and Close** to save your changes and close the return configuration set.